

Everest Group PEAK Matrix[®] for Google Cloud Platform (GCP) System Integrators 2021

Focus on Wipro
December 2020



Introduction and scope

Everest Group recently released its report titled [System Integrator \(SI\) Capabilities on Google Cloud Platform \(GCP\) PEAK Matrix® Assessment 2021](#). This report analyzes the changing dynamics of the GCP public cloud landscape and assesses system integrators across several key dimensions.

As a part of this report, Everest Group updated its classification of 18 system integrators on the Everest Group PEAK Matrix® for SI capabilities on GCP Services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix® is a framework that provides an objective, data-driven, and comparative assessment of GCP system integrators based on their absolute market success and delivery capability.

Based on the analysis, **Wipro emerged as a Leader**. This document focuses on **Wipro's** SI capabilities on GCP and includes:

- Wipro's position on the SI capabilities on GCP Services PEAK Matrix®
- Detailed GCP services profile of Wipro

Buyers can use the PEAK Matrix® to identify and evaluate different system integrators. It helps them understand the system integrators' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix® is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements and match them against system integrator capability for an ideal fit.

Background of the research

- Enterprise consumption of cloud has experienced a dramatic shift, from a skeptical outlook to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or more public clouds in their enterprise environment
- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises saw clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts, with migration to public cloud being a key transformation lever
- Despite being a late entrant when compared to AWS and Azure, GCP has registered good growth and captured a meaningful share in the hyperscaler market. GCP's innovation-driven culture and offerings across infrastructure, platforms, data, and next-generation segments have helped it create a niche amongst the hyperscalers. With the recent restructuring of sales team and renewed go-to-market strategy, GCP has seen a spike in demand for its offerings. Rapid adoption, coupled with management complexities and talent crunch, is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the GCP landscape across infrastructure, platform, data, and next-generation technology segments
- In this research, we present an assessment of 18 GCP cloud system integrators featured on the SI capabilities on GCP PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with GCP system integrators, client reference checks, and an ongoing analysis of the cloud services market.

This report assessed the following 18 system integrators on the GCP PEAK Matrix® Assessment 2021:

- **Leaders:** Accenture, Atos, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa
- **Aspirants:** Aspire Systems, Coforge, and UST Global

Scope of this report:



Geography
Global



System integrators
18 leading cloud system integrators



Services
Cloud services

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) PEAK Matrix® Services characteristics

Leaders:

Accenture, Atos, HCL Technologies, Infosys, TCS, and Wipro

- Leaders have established successful businesses in GCP services, driven by capability building and experience across the infrastructure, platform, data, and next-generation capabilities
- These players continue to proactively drive investments in next-generation technology themes such as data & analytics and AI/ML and build strategic roadmaps for GCP services (internal IP/tools, partnerships, co-innovation labs, and CoEs)
- Leaders have a strong focus in driving alignment between the business and IT teams of enterprises to drive higher value through contextual solutions tailored to specific enterprise requirements
- All Leaders have a strong focus on driving large-scale/complex cloud transformation, specifically for the large enterprise segment (with annual revenue greater than US\$5 billion)

Major Contenders:

Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa

- Major Contenders in the GCP services space include born in the cloud as well as established system integrators
- While global players strongly leverage/include their assets and data center footprint along with their GCP services offerings, “asset-light” providers leverage their partner technology ecosystem to provide these services
- These companies continue to invest aggressively in building their IP, partnership ecosystem, and delivery capabilities across the GCP services spectrum, as well as in increasing their global coverage

Aspirants:

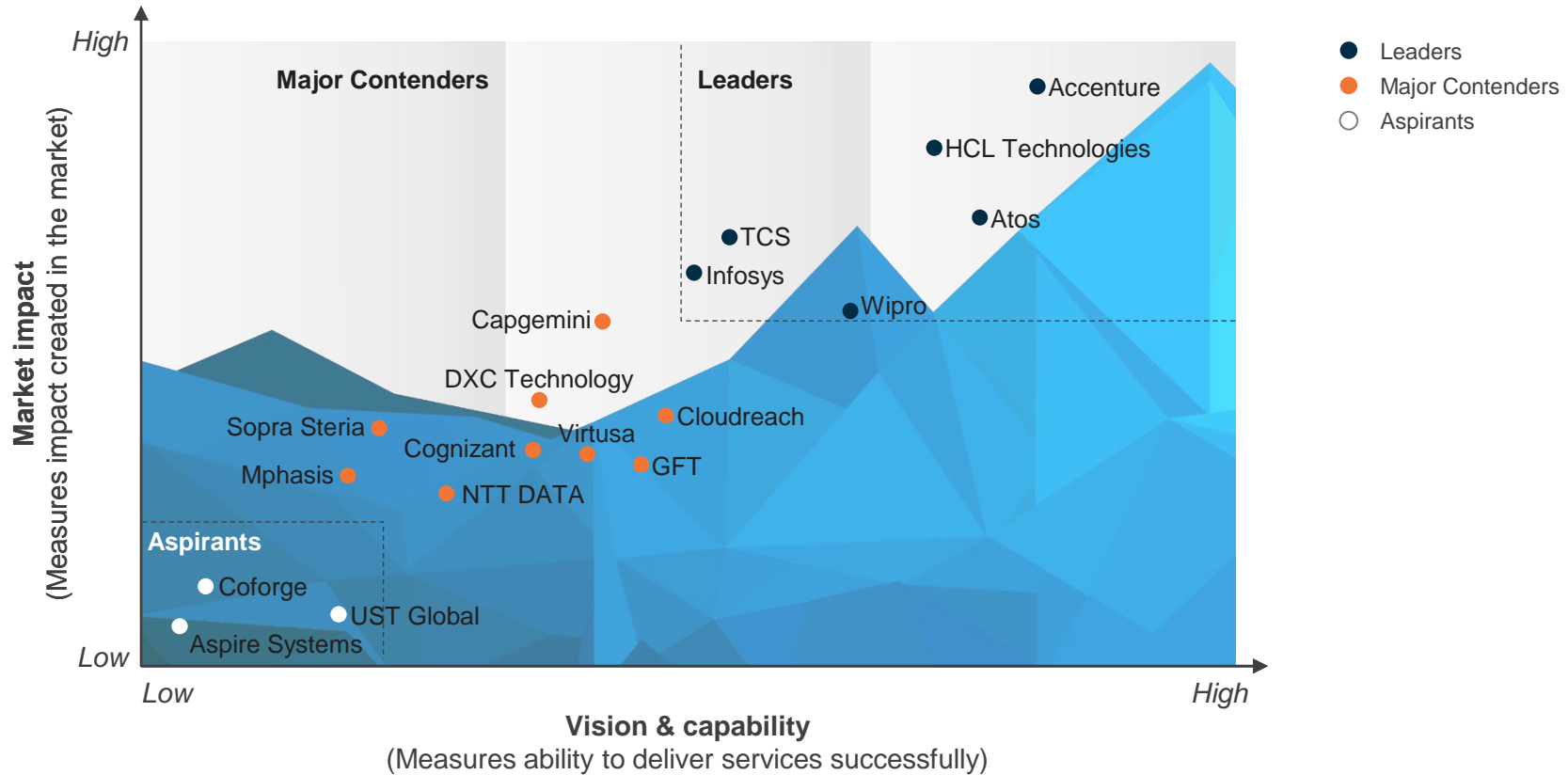
Aspire Systems, Coforge, and UST Global

- The GCP services business of Aspirants is in the initial stages of asset and capability maturity
- While these system integrators are making investments to build delivery capabilities and IP/tools, they will also need to develop and strengthen advisory and design services capabilities on GCP to build market awareness and credibility as strategic transformation partners for enterprises

Everest Group PEAK Matrix®

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021 | Wipro positioned as Leader

Everest Group System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021



Note: Assessment for Atos is based on Everest Group's proprietary Transaction Intelligence (TI) database, system integrator's public disclosures, and Everest Group's interactions with enterprises that have adopted GCP
 Source: Everest Group (2020)

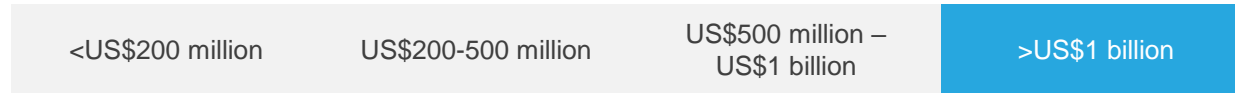
Wipro | system integrator capabilities on GCP (page 1 of 5)

Overall cloud services overview

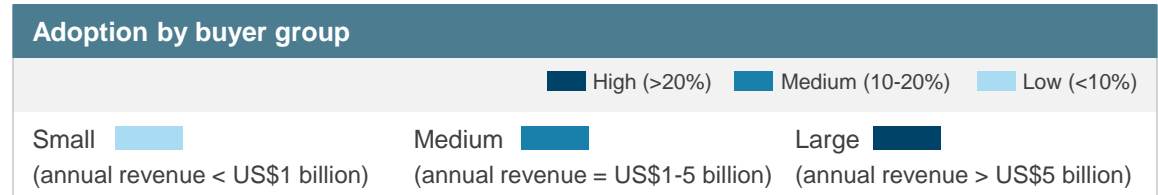
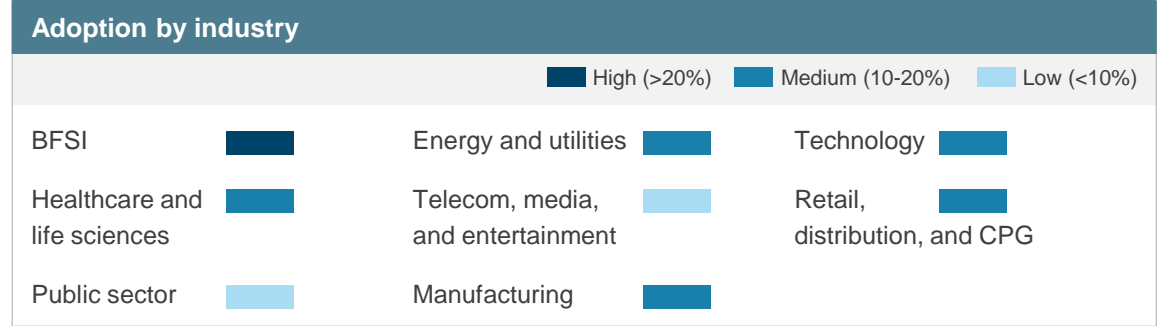
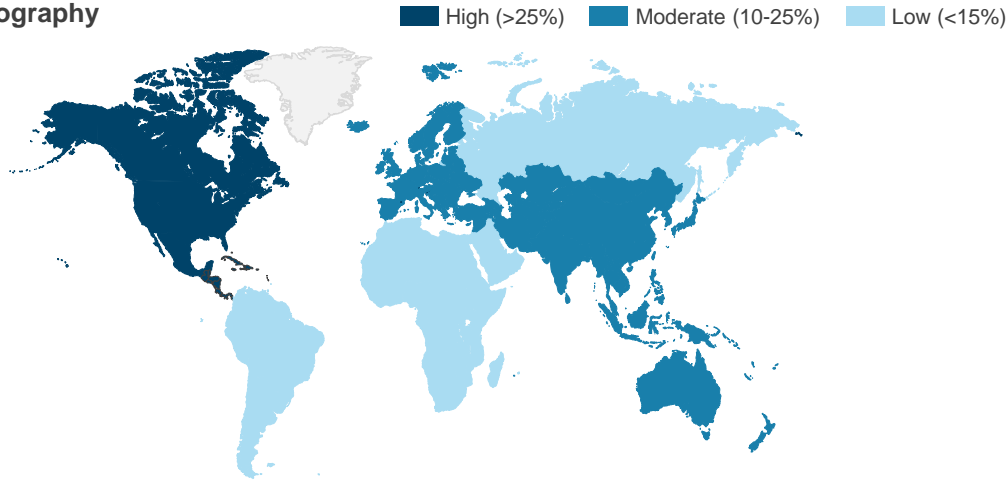
Cloud services vision:

Wipro's vision is to be a preferred partner of choice for global enterprises and accelerate its business transformation by providing full-stack cloud services such as IaaS, PaaS, CaaS, and SaaS. It takes a business-first and cloud-led strategy to serve enterprise needs from the edge-to-cloud across vertical domains, delivered through industrialized and automated platforms.

Overall cloud services revenue (2019)



Adoption by geography



Source: Everest Group (2020)

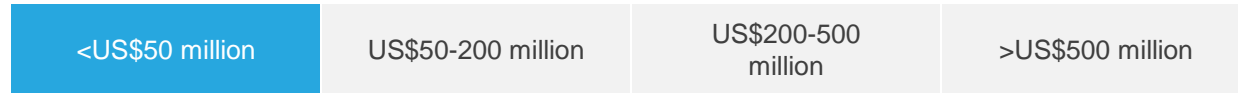
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Capabilities on GCP overview

GCP partnership overview:

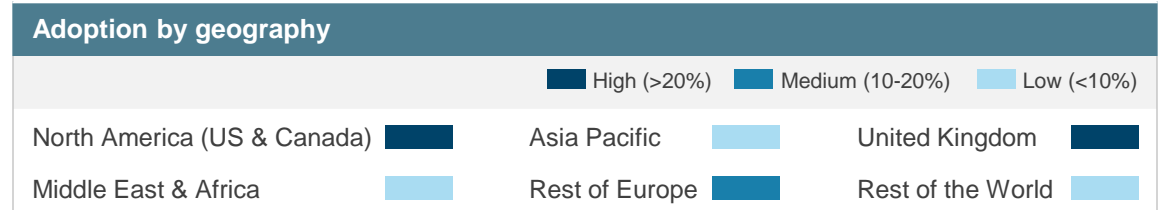
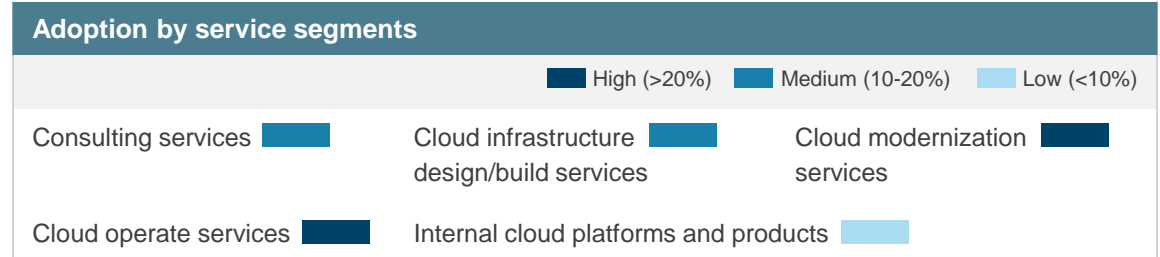
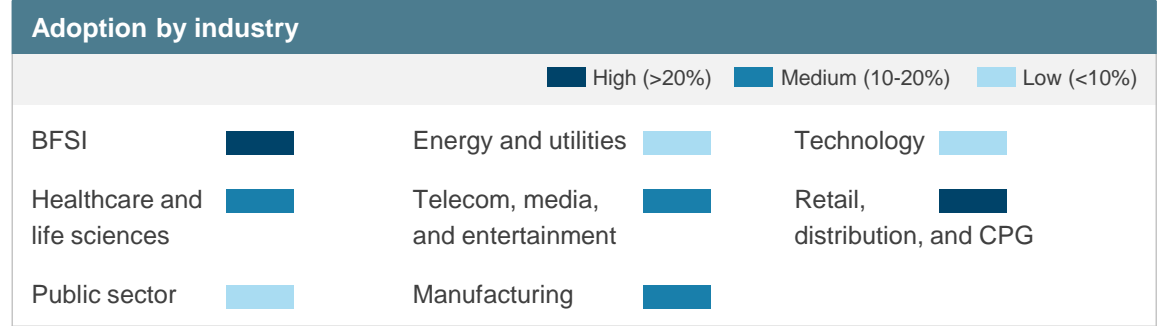
Wipro is a premier consulting partner of GCP. Wipro's relationship with Google and its parent Alphabet has shaped into a strategic 360° partnership and has established a dedicated business unit on Google Cloud.

Revenue from GCP-related services (2019)



GCP portfolio – key highlights (representative list)

- Wipro is an MSP partner, part of Customer Acceleration Program (CAP) for SAP workloads and has enterprise work transformation and cloud migration specialization, and is an Anthos launch partner
- Wipro is accredited with “Cloud Security Specialization” badge
- Wipro got recognized by Google for SAP on GCP expertise
- Wipro is recognized as best GSI by leading data platform company - Looker
- Offered several COVID-19 offerings which focused on the following themes: Google Contact Center AI, Google Chrome Enterprise, G- Suite, financial freedom, supply chain disruption, increased compliance, and physical to digital shift
- Key use cases delivered on GCP include:
 - Application and infrastructure transformation on GCP
 - Enterprise data & analytics platform modernization
 - SAP on GCP



Wipro | system integrator capabilities on GCP (page 3 of 5)

Key solutions

Proprietary solutions (representative list)

Solution name	Details
Cloud native product studio (CNPS)	CNPS is a framework of components based on a container management platform (Kubernetes), which has ready-to-use components that enhance application functionality with Non-Functional Requirements ((NFRs) needed on a cloud/on-premise container environment
Run Ops automation solution	Automation solution for cloud operations for cloud-hosted products & platforms
EDOC	Used to provision, configure, secure, monitor, and manage workloads through a single pane of glass
SNIFE	AI-powered BI transformation accelerator that supports platform migration, rationalization, and modernization, leveraging rich artefact libraries
Track and Trace	Smart Track and Trace solution from Wipro addresses the indoor and outdoor tracking challenge faced by multiple industries
Wipro CARG (Cloud Application Risk Governance)	A platform that provides real-time application risk posture view, provides regulatory and compliance view for each application, detects potential security issues in cloud-based business application, and recommends base security controls needed for application protection in cloud based on business, compliance, and regulatory requirements
Cloud trust	Wipro CloudTrust service is a comprehensive life cycle framework that addresses security challenges for enterprises adopting the cloud
Wipro devNXT	devNXT is a next-generation solution to enhance and speed up the application development life cycle for cloud-native applications
Cloud validation rig	End-to-end test solution for testing cloud-based applications
Digital Experience Platform (DXP)	A proprietary platform to provide connected CX across channels, devices, and domains. It provides insight-driven experiences by aggregating, transforming, and generating insights from different sources of data
Cloud Data warehouse Readiness Solution (CDRS)	It helps enterprises scale their cloud data transformation initiatives by enabling smoother migration of data from on-premise data warehouses/databases to cloud-based data warehouse/database/big data technologies by patented migration framework
Boundaryless enterprise	A cloud management platform to manage IaaS and provide a single pane of glass across IaaS, PaaS, CaaS, and DevOps across private cloud and public cloud
Application Modernization Toolkit (AMT)	AMT helps in tool and survey-based assessment for technical debt and effort estimation and provides auto remediation with built-in eclipse plugin

Wipro | system integrator capabilities on GCP (page 4 of 5)

Case study, investments, and recent activities

Case study	
A leading health technology company migrates to smart, scalable Google Cloud platform	
Client	Leading Dutch multinational company focused on health technology
Business challenge	<p>The business had maintained several traditional IT systems and ways of working. It had high-cost base and slow time-to-market. The client desired to:</p> <ul style="list-style-type: none"> • Break the current ways of working and accelerate time-to-market • Control edge and cloud workloads from a single pane for better visibility of the IT estate • Remove traditional IT platforms and reduce cost by moving to cloud
Solution	Wipro leveraged its accelerator solutions to quickly build and verify the Google Cloud platform for the client, designed around a centralized architectural model to provide robust governance with strong security control in the initial phase. The entire environment was validated to meet FDA's requirements to provide a trusted platform at the outset. Platform-enabled self-service integration allowed rapid access across environments to deploy workloads autonomously by using infrastructure as code deployment scripts and methodologies. The ongoing roadmap was designed to address data sharing and access issues with strong data loss prevention controls. Migration of legacy workloads from traditional infrastructure to highly available container-based environments through NoOps methodologies to further control IT spend
Impact	<ul style="list-style-type: none"> • It led to 30% cost savings in future projects due to solid foundation as per architectural guidelines • 3X faster time-to-market and 2X enhanced user experience by smart, scalable, secure, and cost-effective cloud-based offshore execution model • 2X product releases and smooth transformation to GCP

Recent investments and activities (representative list)	
Development	Details
IPs and tools	<ul style="list-style-type: none"> • Container accelerator • Anthos lighthouse • Data transformation pod
Innovation arena	Google Innovation Arena - Multi-disciplinary co-innovation center for specialized teams to craft truly innovative solutions leveraging GCP offerings
Domain solutions	<ul style="list-style-type: none"> • CROAMIS - Wipro's leading cargo management platform for airlines and airport logistics customers • TOPS – Wipro's leading passenger and airlines operations platform for airlines industry • Content moderation platform – Wipro's platform built natively on Google Cloud using its AI/ML services for media houses to classify contents such as fake news • 5G Edge Cloud - Wipro's 5G edge infrastructure and cutting-edge apps hosted using Google's Anthos infrastructure for telco edge cloud

Wipro | system integrator capabilities on GCP (page 5 of 5)

Everest Group assessment – Leader

Measure of capability: ● High ◐ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Wipro has built a Google innovation arena that is a multi-disciplinary co-innovation center for specialized teams to craft solutions leveraging GCP offerings
- Wipro has “GCP Specializations” in cloud migration, work transformation - enterprise, and security and has “GCP Expertise” in SAP on Google Cloud. It is also an MSP
- It has GCP specific migration assets such as application modernization toolkit and Data Transformation Pod for end-to-end data transformation
- Clients have called out technical expertise, domain expertise, talent management, and pricing to be one of the strong suits for Wipro on GCP

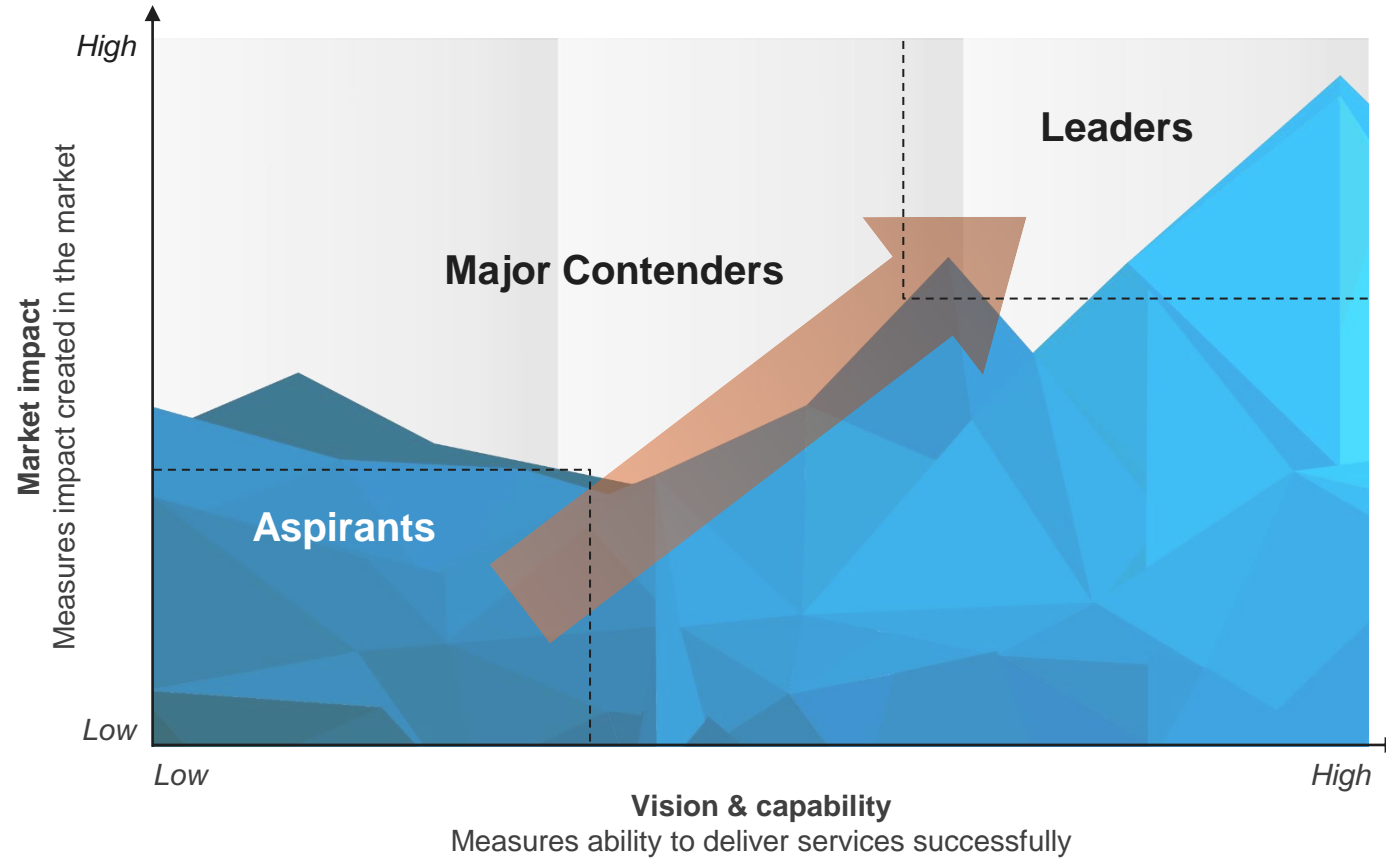
Areas of improvement

- Wipro needs to augment its existing capabilities by in attaining “GCP Specializations” in application development, data analytics, infrastructure, and machine learning
- Wipro needs to aggressively invest in developing vertical-specific capabilities on GCP to continue differentiating itself from peers
- Sharpened support response and responsiveness to requests have been cited as areas of improvement for Wipro by GCP clients

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

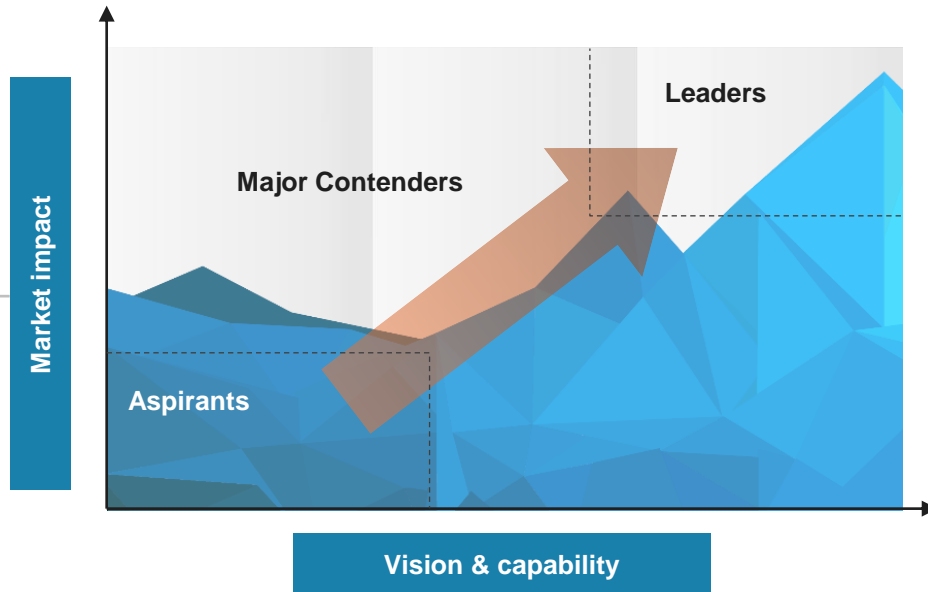
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YOY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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